

Raymond's Office Works, LLC
Client Organizer for Tax Year 2025

Name: _____ DOB: _____ SSN: _____ Occupation: _____
Spouse's Name: _____ DOB: _____ SSN: _____ Occupation: _____
Address: _____
County: _____ Township: _____
TP Phone Number: _____ Spouse Phone Number: _____ Email: _____

Personal Information:

Check if no changes from 2024
 Check if want direct deposit – If so: Routing _____ Account _____ Bank _____
 Married or Divorced during 2025, if so date: _____
 Spouse died during 2025, if so date: _____
 Moved during 2025, if so date: _____ Municipality & School District – Before _____ After _____
If Sold/Purchased Home NEED HUD Statement
 Disabled, if so date: _____ Legally Blind, if so date: _____

Dependents: Check if no changes from 2024. **WHO DOES CHILD RESIDE WITH? WHO HAS FULL CUSTODY?**

Name	SSN	DOB	# months in home	Relationship
1)				
2)				
3)				
4)				

PLEASE REVIEW THE INCOME AND DEDUCTIONS SECTION BELOW. PLEASE CIRCLE ALL THE ITEMS THAT APPLY TO YOUR TAX RETURN.

INCOME

- Wages – W-2's **IF OVERTIME BRING YOUR LAST PAYSTUB FOR 2025 FROM EACH EMPLOYER**
- Interest Income – 1099-DIV and 1099-INT - Any foreign financial accounts or trusts?
- Capital Gains/Losses
 - Real Estate (Include HUD statement from purchase and sale)
 - Sale of stocks & bonds (1099-B Form)
- Income from Partnership, S-Corp, other – K-1
- Installment Sales – enclose sale paperwork (usually legal document)
- Social Security and/or Disability – enclose SSA-1099
- Sale of Personal Residence – Include:
 - HUD Statement from when originally purchased home & when sold home.
 - Cost of improvements made to the home and any expenses related to selling the home.
 - Was the property rented or used for business during your ownership period?
- Pensions / Annuities / IRA's – 1099-R Form
- Alimony
- Tips / Gratuities **** **Bring last pay stub or records showing tips!!!!**
- Lottery Winnings
- Self-employment or Farm
- Rental Income
- Unemployment Compensation
- Other Income
- Scholarships

DEDUCTIONS/CREDITS – Include receipts or documentation.

- Retirement Plan Deposits – enclose proper documentation (deposit paperwork), example IRA.
 - Are you covered by a pension plan?
Taxpayer **IRA Contribution – Roth \$** _____ **Traditional \$** _____
Spouse **IRA Contribution – Roth \$** _____ **Traditional \$** _____
- Medical Expenses –
Prescriptions, insurance premiums and/or group health (**ONLY IF PAID WITH TAXED DOLLARS, IF DEDUCTED PRE-TAX FROM PAYROLL, IT CANNOT BE DEDUCTED AS AN EXPENSE**), physician, dentist, clinics, and hospital charges, etc.
- Taxes – Real Estate taxes, Auto Purchases (Need Pink Slip)
- Interest Paid – **MUST PROVIDE 1098 FORM** - Mortgage interest, home equity loans, & student loans
- Contributions – Charitable contributions of \$250 or more at one time require written acknowledgement from the charitable organization. Examples: church and religious organizations, cancer, Red Cross, YMCA, united way, etc. Also non-cash donations would include donations to good will, etc. Volunteer work can also claim mileage. All of these items need backup to claim the credit. **No Contributions to election funds.**
- Miscellaneous Deductions – Enclose receipts.
These deductions include: union dues, subscriptions/trade journals, uniforms, telephone if required, investment expenses, professional dues, tools/shoes/glasses, job related education expenses, mileage if applicable and **alimony paid** (name and SSN paid to).
- Child & Dependant Care – If you paid someone to care for your child (under age 13), we need the name, address, ID#, and amount paid for the childcare provider (Child Care Provider Statement)
- Office in Home – If a home office is used, please include the following: date acquired, cost of home & land, cost of improvements, sq ft of living area & office area, utilities paid, RE interest, taxes, home insurance, and any other yearly costs related to the home.
- Estimates paid during year – enclose backup including amounts and dates paid, generally on 1040ES forms.

QUESTIONS:

- | | | |
|---|--------|-------|
| Were you eligible to be claimed as a dependent on another tax return? | __ Yes | __ No |
| Were you notified by the IRS, state, or local of any change to your prior year tax return? | __ Yes | __ No |
| Did you make any gifts over \$19,000 in value to any individual? | __ Yes | __ No |
| Did you have earned income from abroad? Any foreign investments? | __ Yes | __ No |
| Did you receive any reimbursement (law suits, insurance) for any expense claimed on a prior return? | __ Yes | __ No |
| Do you expect any significant changes in income or tax liability in the coming year? | __ Yes | __ No |
| Did you pay college tuition for yourself, spouse, or dependant? | __ Yes | __ No |
| Do you make payments on a student loan? If so, student loan interest statement. | __ Yes | __ No |
| Did you make any energy-efficient improvements? Windows, doors, furnace? MUST have docs | __ Yes | __ No |
| Did you sell any Real Estate/Business through an installment sale? | __ Yes | __ No |
| Do you have any credit card cancelled/forgiven debt? 1099C | __ Yes | __ No |
| Did you have Marketplace Insurance? If so need 1095-A | __ Yes | __ No |

PLEASE BRING ALL NECESSARY INFORMATION WITH YOU TO YOUR TAX APPOINTMENT – THIS INCLUDES ALL W-2'S, 1099'S, UNION DUES, CHILD CARE INFO, REAL ESTATE TAXES, MORTGAGE STATEMENTS (1098), EDUCATION STATEMENTS (1098T), ECT. IF YOU PURCHASED A NEW CAR PLEASE BRING YOUR PINK SLIP.

IF OVERTIME - BRING YOUR LAST PAYSTUB FOR 2025 FROM EACH EMPLOYER

IF TIPS RECEIVED - BRING LAST PAYSTUB OR BACKUP SHOWING THE TIP AMOUNTS

IP PIN - IF YOU HAVE ONE

NO DOCUMENTS – NO CREDITS